

2020 Global Tourism Watch Highlights Report

Quebec
November 2020

Publishing date: October 2021

CANADA 
FOR GLOWING
HEARTS

Canada

Québec City
Québec

 **DESTINATION
CANADA**

STUDY OVERVIEW

Study Overview:

As a result of the COVID-19 pandemic in 2020 and the renewed focus on domestic travel, the Canada study was conducted among the general population (excluding residents of the Northern Territories). A total of 9,059 Canadians participated.



GTW Provincial Sample Distribution:

British Columbia Residents:	1,500
Alberta Residents:	1,500
Saskatchewan Residents:	500
Manitoba Residents:	500
Ontario Residents:	2,101
Quebec Residents:	1,507
New Brunswick Residents:	400
Nova Scotia Residents:	400
Prince Edward Island Residents:	250
Newfoundland & Labrador Residents:	401

At the provincial level, respondents are split into two groups based on their travel behaviour:

Domestic Out-of-Province Travellers: Canadian residents aged 18 years and older, who have taken a pleasure trip in Canada beyond their own province where they had stayed at least 2 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year. These respondents evaluated destinations outside of their province.

In-Province: Canadian residents aged 18 years and older, who evaluated destinations within their province of residence.

Context:

It is important to consider the results based in light of the COVID-19 situation at the time of data collection. In November 2020, no vaccine was approved for use and Canada was at the start of its 2nd wave of COVID-19. Many provinces tightened restrictions in November in an effort to contain the pandemic. Non-essential travel within Canada and beyond the country was discouraged. The Canada/US border had been closed since March 2020.

For additional context around the current COVID-19 situation in Canada, please refer to Destination Canada's [COVID-19 Research page](#), which includes information on resident sentiment, travel related measures, impact and recovery, and forecasting.



Timing of Fieldwork: Nov 2020

This report contains a summary of key metrics about residents of Quebec.

Results are presented for three main groups:

- Total residents: Results among the total sample of QC residents (n=1,507)
- Out-of-province: Results among out-of-province travellers in QC who evaluated destinations outside of QC (n=753)
- In-province: Results among residents of QC who evaluated destinations within QC (n=754)

Charts are colour coded to show the results among each group:

Legend:

Total Residents

Out-of-Province Travellers

Residents evaluating in-province destinations

KEY HIGHLIGHTS

Key Highlights – Quebec Market

Insight	Implication
<p>There is pent up demand for travel, but Quebec residents also have concerns, primarily related to health and safety in a potential destination.</p>	<p><i>Illustrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage residents of Quebec to travel within the province and to other Canadian provinces and territories in 2021.</i></p>
<p>There is a small group of Quebec residents that feel safe travelling now. This group is more likely to have travelled since the start of the pandemic and is more likely to be comfortable flying domestically. The biggest barrier to travel within Canada for those who feel safe travelling is cost.</p>	<p><i>Travel deals and illustrating the value of a vacation within Quebec or to other Canadian provinces and territories may motivate this group to travel more in 2021.</i></p>
<p>Leisure travel will drive Quebec residents' travel in 2021. Quebec residents are the most likely of all Canadian residents to travel for vacation purposes while they are the least likely to travel to visit friends and family.</p>	<p><i>There is a better opportunity to reach potential Quebec travellers by marketing leisure trip itineraries, rather than focusing on VFR travel.</i></p>
<p>Even when travelling out-of-province, Quebec residents are following a Canada-wide trend of staying closer to home: Ontario is the top out-of-province destination under consideration.</p>	<p><i>Ontario has the most to gain from the Quebec market.</i></p>
<p>There are mixed opinions on city travel. For out-of-province travel, there is considerable interest in visiting major cities (e.g. Vancouver, Toronto, and Ottawa). For travel within Quebec, Québec City is at the top of the consideration list for in-province travel, but there is also generally greater appetite for trips to smaller, more rural destinations.</p>	<p><i>There is an opportunity for cities outside of Quebec to attract visitors from Quebec, while both cities and more rural destinations within Quebec may find a good opportunity with the resident market.</i></p>
<p>Quebec residents are very outdoors focused, with COVID-19 likely enhancing the popularity of outdoor activities such as hiking/walking in nature, natural attractions, and nature parks. These activities are more popular in Quebec than in any other Canadian province.</p>	<p><i>Communicating the availability of popular outdoor activities in uncrowded settings, whether within Quebec or in other provinces or territories, will capture the attention of potential travellers in Quebec.</i></p>
<p>Younger Quebec residents (under 35 years) are eager to resume travelling. They are less concerned about health and safety and have the strongest intent to travel both within and outside of Quebec. This audience is also the most open to visiting larger Canadian cities such as Vancouver and Toronto.</p>	<p><i>Younger Quebec residents (under 35 years) represent the best immediate opportunity for Quebec-based operators as well as those in other provinces and territories, and in particular for larger cities.</i></p>
<p>Older Quebec residents (55+ years) are more hesitant to travel in the near future. Much of their hesitancy is related to health and safety concerns.</p>	<p><i>Clearly illustrating in communications that health and safety measures are being followed and that a destination is safe is particularly important for attracting older Quebec residents (55+ years).</i></p>

DOMESTIC TRAVEL INTENT AND CONSIDERATION

Key Insights:

- As seen with residents across Canada, the COVID-19 pandemic has severely impacted Quebec residents' plans to travel in 2021.
- The outlook for in-province travel in Quebec is consistent with the national average while the outlook for out-of-province domestic travel is slightly below average.
- With Quebec residents following a Canada-wide trend for staying closer to home, **Ontario is the province that stands to benefit the most from the Quebec outbound market.**

Vacation Outlook – Next Year vs. Past Year (% spending more time minus % spending less time)

Staying at home	+27
Travelling within Quebec	-7
Travelling outside of Quebec, but within Canada	-39
Travelling outside of Canada	-62



Total Residents (n=1507)

Likelihood of Travelling within Canada – Next Year

Out-of-Province Travel

Immediate Potential
(Any trip length within Canada
outside of own province)



Out-of-Province Travellers (n=753)

Market Size Potential
(Out-of-Province Travellers
considering visiting each region)



British Columbia	1.08 M
Alberta	642,500
Saskatchewan/Manitoba	304,500
Ontario	1.51 M
Atlantic	2.16 M
North	273,500

In-Province Travel

Immediate Potential
(Any trip length within province)



Residents evaluating in-province destinations (n=754)

DOMESTIC TRAVEL INTENT AND CONSIDERATION (CONT.)

Key Insights:

- Ontario is the province most likely to be under consideration for a visit in the next year, and three of the top five destinations under consideration are in Ontario. **Ontario stands to benefit the most from the Quebec outbound market.**
- Major Canadian cities (Vancouver, Toronto, and Ottawa) are also of interest to Quebec out-of-province travellers. **There is an opportunity for major Canadian cities outside of Quebec to attract visitors from Quebec.**
- In other provinces, there is a trend among in-province travellers to prefer more rural destinations over cities. The pattern in Quebec is slightly different, with Québec City being the top destination under consideration, followed by more rural destinations. **There is an opportunity for both Québec City and several smaller destinations to capitalize on the in-province market.**

Destinations Seriously Considering – Next Year

Out-of-Province Travel – Top 3 Provinces

40%	29%	19%
Ontario	British Columbia	New Brunswick

Top 5 Destinations

29%	25%	21%	20%	19%
Vancouver	Toronto	Niagara Falls	Ottawa	Banff & Lake Louise

Out-of-Province Travellers (n=753)

In-Province Travel – Top 5 Destinations

Québec City	31%
Charlevoix	27%
Gaspésie	25%
Cantons-de-Est / Eastern Townships	21%
Laurentides	18%

Residents evaluating in-province destinations (n=754)

Most Appealing Destinations / Destination Knowledge

Out-of-Province Travel – Top 3 Appealing Provinces

	Ontario	British Columbia	New Brunswick
Most Appealing	34%	23%	10%
Knowledge (excellent/very good)	43%	36%	43%

Top 3 Appealing Destinations

	Vancouver	Toronto	Niagara Falls
Most Appealing	14%	10%	9%
Knowledge (excellent/very good)	48%	50%	42%

Out-of-Province Travellers planning to travel within Canada in next year (n=560/n=544)

In-Province Travel – Top 3 Appealing Destinations

	Most Appealing	Knowledge (excellent/very good)
Charlevoix	23%	35%
Gaspésie	22%	37%
Québec City	21%	52%



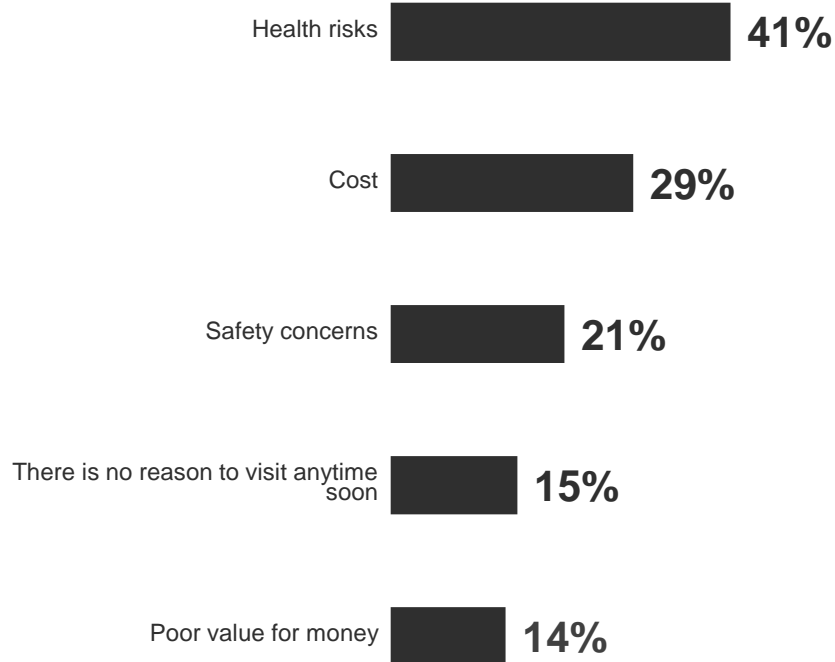
Residents evaluating in-province destinations planning to travel within Canada in next year (n=524)

BARRIERS TO TRAVEL WITHIN CANADA

Key Insights:

- Health risks are the top barrier to travel within Canada. Concerns about health risks increase with age and may be linked to the availability of a vaccine for COVID-19 (as this study was fielded in November 2020). As more Quebec residents are vaccinated, health risks may decline as a barrier to travel. ***Demonstrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Quebec residents to travel within the province and to other Canadian provinces and territories.***
- Just 15% of Quebec residents feel safe travelling now. This group is more likely to have travelled during the pandemic and say they are comfortable flying domestically. The top barrier for this group is cost, so ***travel deals could motivate those already comfortable with travelling to take more trips.***

Top 5 Barriers to Travel



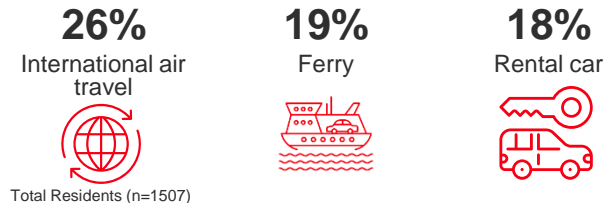
Total Residents (n=1507)

COVID-19 CONSIDERATIONS

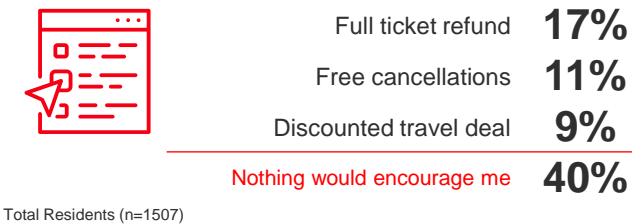
Key Insights:

- There is pent up demand for travel, with nearly two-thirds of Quebec residents indicating they are eager to travel again.
- Relative to the Canadian average, residents of Quebec are most open to flying internationally, suggesting they are more open to visiting destinations outside Canada. **There may be a greater risk of Quebec travellers choosing international destinations once restrictions allow.**
- Residents of Quebec are most interested in taking trips where activities and social interactions are limited, and with more outdoor-based activities. They are open to re-visiting familiar destinations and travelling to new ones. **There is a greater opportunity to resonate with potential Quebec travellers by highlighting outdoor activities in uncrowded destinations.**
- When choosing a destination, health and safety measures are the most important consideration for potential Quebec travellers. Quebec residents are also more concerned about cancellation insurance relative to the Canadian average. **To reassure potential visitors, it is important to communicate that health and safety protocols are in place.**

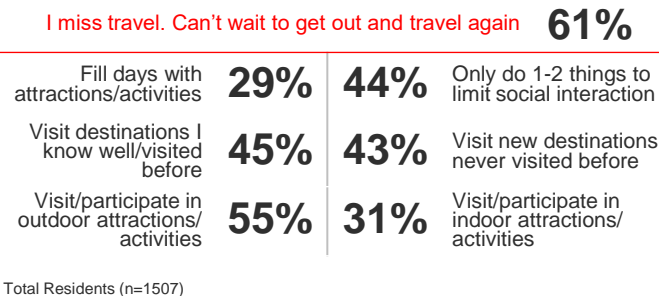
Transportation Mode Likely to Use – Top 3



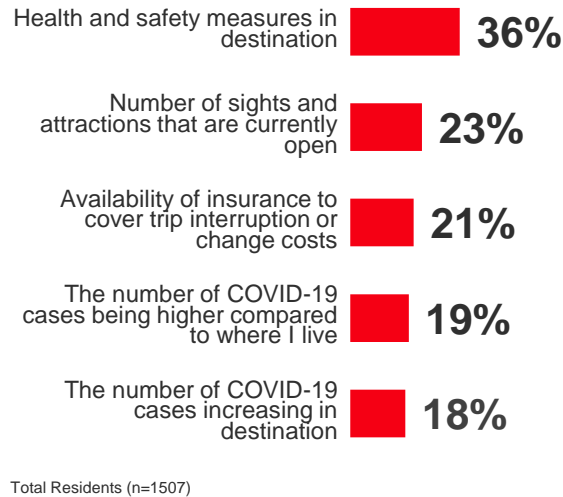
Incentives to Book in the Near Future – Top 3



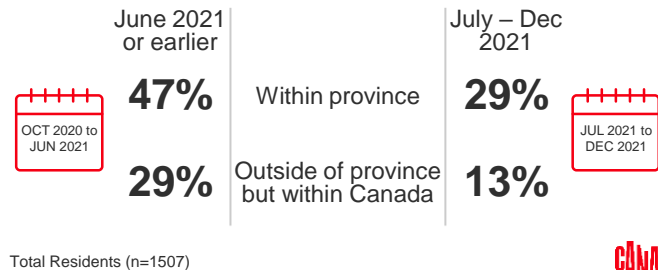
Attitudes Towards Travel – Top2Box



COVID Specific Factors to Consider when Selecting Destination – Top 5



First Time Comfortable Travelling



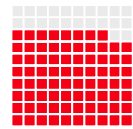
KEY CHARACTERISTICS OF NEXT CANADA TRIP

Key Insights:

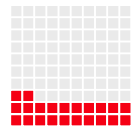
- Travelling for vacation purposes will drive travel in 2021. Relative to the Canadian average, Quebec residents are the most likely to travel for vacation purposes and the least likely to travel to visit family and friends. **There is a better opportunity to reach potential Quebec travellers by marketing leisure trip itineraries, rather than focusing on VFR travel.**
- In the next year, domestic travel parties will largely be made up of immediate family, with friends being more likely to travel together within Quebec. **Couples and families represent the greatest potential markets for travel outside of Quebec, while travel with friends could be an additional potential audience within Quebec.**

Trip Purpose

Out-of-Province Travel



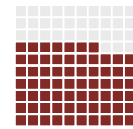
Vacation
78%



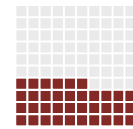
Visit family and friends
22%

Out-of-Province Travellers answering (n=591)

In-Province Travel



Vacation
67%



Visit family and friends
36%

Residents evaluating in-province destinations answering (n=551)

Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

Out-of-Province Travel

35%

4-6 nights



Spouse or partner



67% → **46%**
Would travel with spouse/partner only

Child (under 18 years old)

19%

Alone/solo

13%



46%

Mid-priced hotel/motel

29%

Rented house, apartment or condo

25%

Budget hotel/motel

Out-of-Province Travellers answering (n=591)

In-Province Travel

53%

2-3 nights



Spouse or partner



63% → **42%**
Would travel with spouse/partner only

Friend(s)

16%

Alone/solo

16%



42%

Mid-priced hotel/motel

23%

Budget hotel/motel

22%

Home of friends or family

Residents evaluating in-province destinations answering (n=551)

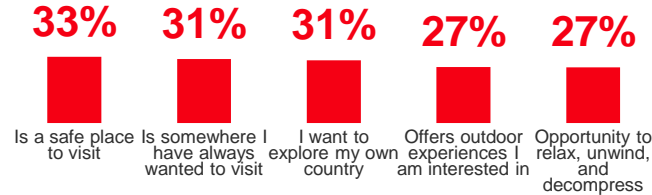
KEY CHARACTERISTICS OF NEXT CANADA TRIP (CONT.)

Key Insights:

- Destination safety and relaxation opportunities are the top factors Quebec residents consider when choosing a destination. **Communicating that travellers can safely relax with health and safety measures in place will help to reassure potential visitors.**
- Quebec residents are drawn to a variety of outdoor activities. Nature parks in particular are more popular among out-of-province travellers in Quebec than in any other province. **Quebec represents a sizeable potential market for nature park experiences, especially for destinations outside of Quebec.**

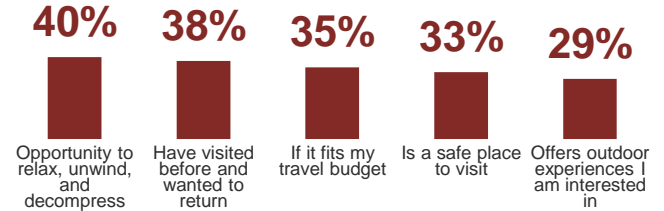
Destination Selection Factors – Top 5

Out-of-Province Travel



Out-of-Province Travellers answering (n=591)

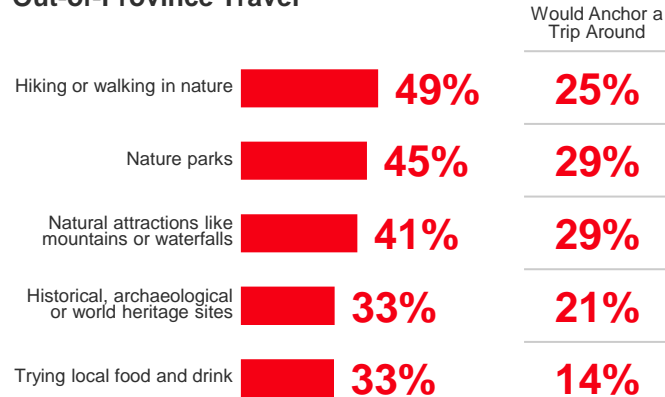
In-Province Travel



Residents evaluating in-province destinations answering (n=551)

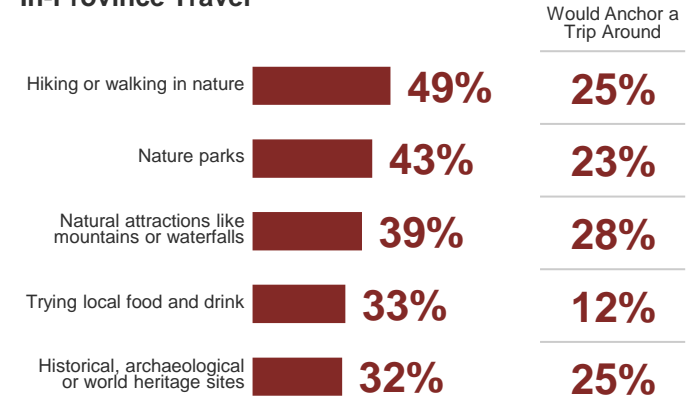
Vacation Activities – Top 5

Out-of-Province Travel



Out-of-Province Travellers answering (n=591/n=726)

In-Province Travel



Residents evaluating in-province destinations answering (n=551/n=678)

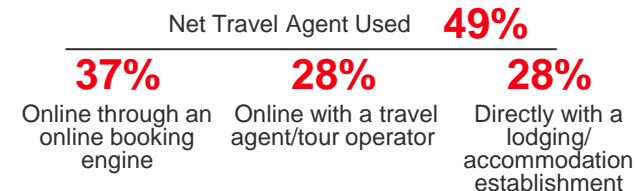
BOOKING

Key Insights:

- There is a role for travel agents supporting domestic travel in the Quebec market, especially for travel outside of the province.
- When deciding to work with a travel agent for any part of the trip planning process, Quebec residents are typically looking for assistance in case of trip interruptions or expert destination knowledge. **The greatest opportunity for travel agents to engage with potential travellers in Quebec is by highlighting those services at the booking stage.**

Accommodation Booking – Top 3

Out-of-Province Travel



Out-of-Province Travellers answering (n=591)

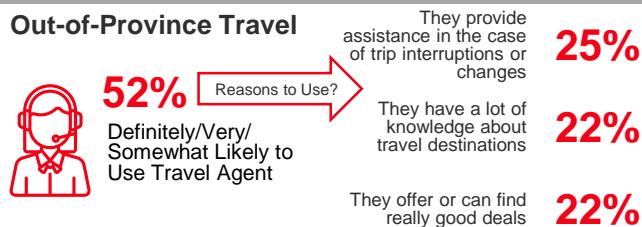
In-Province Travel



Residents evaluating in-province destinations answering (n=551)

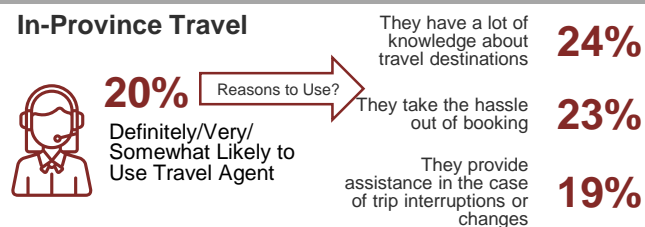
Likelihood to Use Travel Agents/Reasons to Use Agent – Top 3

Out-of-Province Travel



Out-of-Province Travellers answering (n=591)
Out-of-Province Travellers likely to use agent (n=350)

In-Province Travel



Residents evaluating in-province destinations answering (n=551)
Residents evaluating in-province destinations likely to use agent (n=189)

Travel Agent Tasks – Top 3

Out-of-Province Travel



Out-of-Province Travellers likely to use agent (n=305)

In-Province Travel



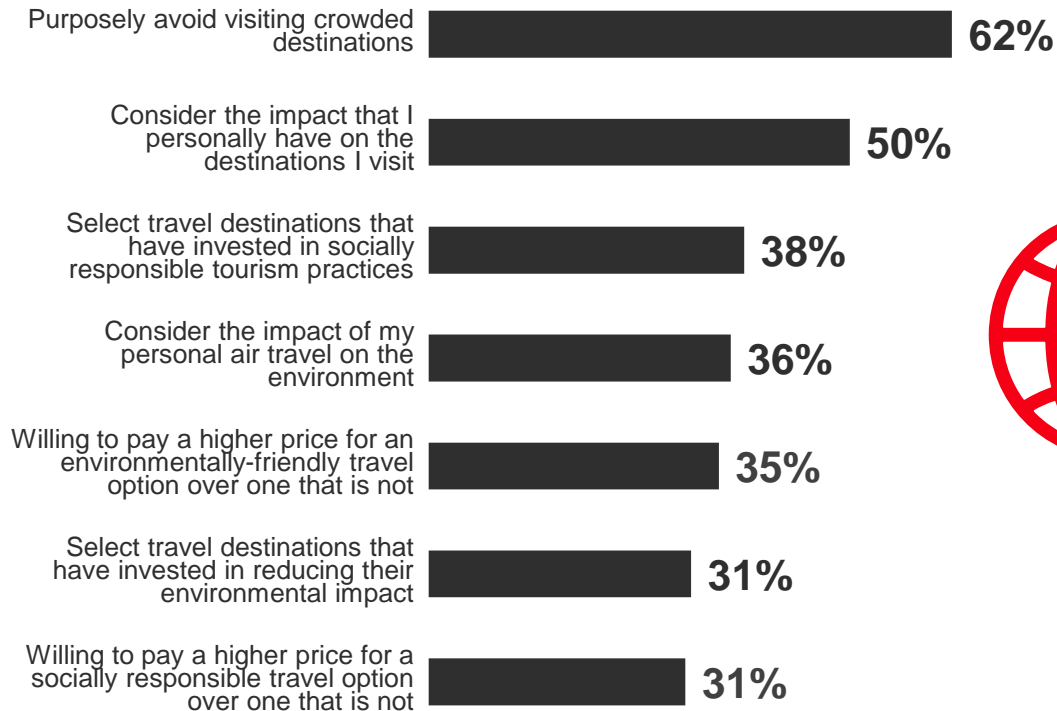
Residents evaluating in-province destinations likely to use agent (n=111)

SUSTAINABLE TRAVEL

Key Insights:

- Residents of Quebec are intentionally seeking out less crowded destinations, which may be related to concerns about COVID-19.
- Roughly one-third of Quebec residents say they consider various aspects of sustainability when selecting travel destinations, and they may be willing to pay for more responsible options. Compared to the Canadian average, Quebec residents are more likely to say that they consider their personal impact when visiting a destination. However, only a handful mention the availability of eco-friendly travel activities as a top factor influencing their destination choice, whether for out-of-province (10%) or in-province (11%) trips. ***This suggests that while sustainability is a consideration for Quebec residents, there are other factors that play a larger role in destination selection.***

Attitudes About Sustainable Travel



Total Residents (n=1507)

DOMESTIC TRAVEL INTENT AND CONSIDERATION

Vacation Outlook – Next Year vs. Past Year

S2. How do you plan to spend your vacation time in the next 12 months compared to the last 12 months? Will you spend your vacation time ...

Likelihood of Traveling Within Canada – Next Year

MP6. Realistically, how likely are you to take a vacation trip outside of your own province, but within Canada in the next year?

Market Potential – Calculated value: Total out of province travellers (S3, S5) seriously considering visiting a province (BVC1a)

Destinations Seriously Considering – Next Year

BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

BVC1b. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

Most Appealing Destinations – Top 3 / Destination Knowledge

MP8a. Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you? (Select one)

MP8b. Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you? (Select one)

MP3. How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

BARRIERS TO TRAVEL WITHIN CANADA

Top 5 Barriers to Travel

MP9. Which of the following reasons might prevent you from travelling within Canada? (Select all that apply)

COVID-19 CONSIDERATIONS

Transportation Mode Likely to Use – Top 3

COV16. As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?

Incentives to Book in the Near Future – Top 3

COV17. Which one of the following offerings would most encourage you to make a travel booking in the near future? (Select one)

Attitudes Toward Travel – Top2Box

COV13. Thinking of your next vacation, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?

Factors to Consider when Selecting Destination (COVID Specific) – Top 5

NEWQ4. When thinking about taking a vacation trip to [within province / outside your own province, but within Canada], which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

First Time Comfortable Travelling

COV5. Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?

KEY CHARACTERISTICS OF NEXT CANADA TRIP

Trip Purpose

FT2. Thinking of your next trip to [within province / outside your own province, but within Canada], what would be the main purpose of this trip?

Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

FT4. Thinking of your next trip to [within province / outside your own province, but within Canada], how many nights do you think you would spend?

FT5. Thinking of your next trip to [within province / outside your own province, but within Canada], who would you travel with? (Select all that apply)

FT10. Thinking of your next trip to [within province / outside your own province, but within Canada], which types of accommodation would you consider staying at? (Select all that apply)

Destination Selection Factors – Top 5

FT3. Thinking of your next trip to [within province / outside your own province, but within Canada], which of the following would factor into your choice to travel to that destination? (Select all that apply)

Vacation Activities – Top 5

FT11. Thinking of your next trip to [within province / outside your own province, but within Canada], what activities would you be interested in participating in? (Select all that apply)

MP12. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

BOOKING

Accommodation Booking – Top 3

FT8. Thinking of your next trip to [within province / outside your own province, but within Canada], which methods would you be likely to use to book your accommodation? (Select all that apply)

Likelihood to Use Travel Agents / Travel Agent Tasks – Top 3

FT6. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Thinking of your next trip to [within province / outside your own province, but within Canada], how likely are you to use a travel agent or tour operator to help you research or book your trip?

NEWQ2. Which of the following reasons is the most important consideration for using a travel agent to book your next vacation trip?

Travel Agent Tasks – Top 3

FT7. Which of the following would you have a travel agent or tour operator help you with? (Select all that apply)

SUSTAINABLE TRAVEL

Agreement with Statements – Top2Box (Strongly/Somewhat Agree)

PC31. Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”. Please indicate your level of agreement with each of the following statements ...